



Honor Gifts

An "Honor Gift" can be a meaningful way to celebrate a birthday, anniversary or special holiday. Consider donating in honor of a special person in your life. Your gift will make a lasting impact on the lives of others, just as your honoree has done for you.

Memorial Gifts

You can make a "Tribute or Memorial Gift."

If you would like to direct, or have your family direct friends to make memorial gifts to Barclay Friends in memory or as a tribute, the following is suggested language for an obituary or other tribute:

In lieu of flowers, gifts may be made to Barclay Friends in memory of {deceased name} to the Caring Fund at Barclay Friends, 700 N. Franklin Street, West Chester, PA 19380

Planned Gifts

Planned gifts are often thought of as a way of "leaving a legacy" that benefits not only you and your family, but also the future of Barclay Friends.

When considering any planned giving option, we encourage you to have a conversation with your financial/legal advisors as to the gift vehicle that would be the most advantageous given your assets and current financial circumstances.

Options to consider

- **Give a percentage of the residue of your estate**—the amount left after taxes and expenses are satisfied and specific bequests have been paid; e.g., "I give 25% of the rest, residue, and remainder of my estate to Barclay Friends."
- **Give a specific dollar amount or item of property**—e.g., "I give Barclay Friends \$25,000"; or "I give Barclay Friends 100 shares of IBM stock."
- **Make your bequest contingent**—e.g., "I give Barclay Friends \$25,000 if my children predecease me."

How you can plan now

Talk with your family

Make sure your family is aware of your wishes to support Barclay Friends by establishing a planned gift.

Contact your financial/legal advisors

Have your estate plan reviewed by a professional to determine the most advantageous gift given your current financial circumstances.

Reflect on your values

Consider gift options that will not only address your family priorities, but also leave a legacy and help to secure the future excellent care and services provided by Barclay Friends.

Talk with Barclay Friends

Talk with a representative at Barclay Friends and/or the Executive Director of Barclay Friends.

Some planned gifts can also offer significant advantages of favorable income, as well as savings on capital gains and estate taxes.



Please contact me for more information about establishing a bequest at Barclay Friends.

Name _____

Address _____

City _____

State _____

Zip _____

Telephone _____

E-mail _____

I have named Barclay Friends in my will.

**Return to: Development Office, Barclay Friends
700 North Franklin Street, West Chester, PA 19380**

Visit <http://bf.kendal.org/giving/> to learn more about giving opportunities at Barclay Friends.